

APPENDIX G: CASE STUDIES

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Lane County Public Market & Food Hub Market Analysis

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Community
Planning
Workshop

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The Community Planning Workshop conducted thirteen case studies of farmers' markets, public markets, and food hubs across the United States. The purposes of the case studies was to understand the range of operational models that exist, identify the successes and challenges of existing operations, and document the financial characteristics of successful public markets and food hubs. The case study information informed the recommendations of what a public market and/or food could be in Lane County.

CPW identified the thirteen case studies through an internet search and a review of existing literature. CPW selected case studies for the Lane County market analysis based on several characteristics: (1) similar population size as Lane County, (2) use of the farmers' market, public market, or food hub as a tourism destination, and (3) range of products and services offered. CPW obtained the information for ten of the thirteen case studies through phone interviews and three food hubs' information through a literature review of existing case studies.

CPW obtained information from the case studies for the following topics

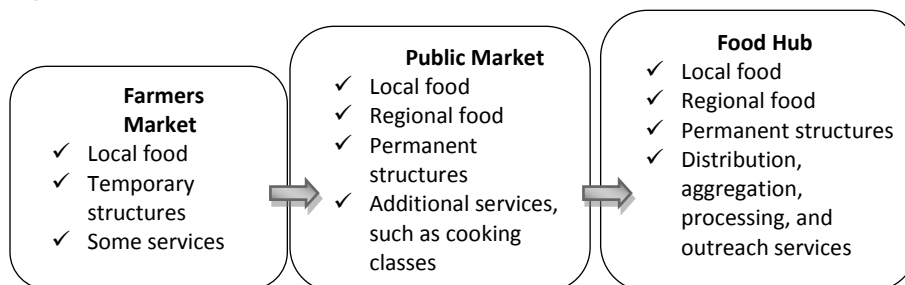
- Business structure: management model and characteristics of the building;
- Financial structure: types of financial sources used for operations;
- Products and services: the range of products, food sourcing, and services for the community as well as for the vendors.
- Market characteristics: the business model, types of consumers, and competitors in the area.
- Successes and challenges: what makes them successful and what challenges they have faced.

Based on the study's definitions of farmers' market, public market, and food hub (**Figure 1**), the team classified the thirteen case studies as:

- three farmers' markets
- five public markets
- five food hubs

Additionally, eight of the case studies are non-profit businesses, three are publicly owned, one is cooperative, and one is a for-profit.

Figure 1. Farmers' Market, Public Market, and Food Hub Continuum



Farmers Markets

CPW identified three farmers' markets as case studies. Although one of these farmers' markets name is a public market, CPW considers the market a farmers' markets by this study's definition.

In the context of this project, a farmers' market is a market with a temporary structure where vendors sell products. Additionally the farmers' market provides some services for the community, such as cooking demonstrations, and some services for vendors, such as marketing the farmers' market.

Boise Farmers' Market Case Study

The Boise Farmer's Market is based in the city of Boise, ID, and has a population of 205,671 people, and a metro population of 616,561 people.

Business Structure

The Boise Farmers' market is a two years old non-profit market, held outdoors in downtown Boise from April through December.

A seven member Board of Directors runs the market and hires the market's director. The board has five seats for farmers, one seat for specialty foods, and one art seat. The elected board appoints an additional two community members.

Financial Structure

The Boise Farmers' Market has a budget of about \$60,000 dollars, which pays salaries, rent for the lot used by the market, produce marketing materials, and temporary infrastructure such as port-o-potties. Vendor fees other financial sources , such as grants and donations, cover the cost of operating the market.

Products and Services

The Boise Farmer' market offers a variety of products including meat, dairy, cheese, fruits, and vegetables Vendors serving the market come from within a radius of about 200 miles.

The Boise Farmers' Market has begun to accept SNAP EBT cards as a way of serving low-income shoppers. This effort extends as a pilot program for other markets looking to incorporate EBT into their range of services. The market runs the Sprout Kids Club where kids are encouraged to eat healthy by signing up and receiving tokens for fruits and vegetables. Market Characteristics

Most market shoppers are from Boise or the greater Boise area.

Successes and challenges

The Boise Farmers' Market attributes their success to three key reasons. First, the market provides customers the ability to trust their food. For instance, the market inspects farms every five years to ensure they are local and of high quality. Second, the market gets involved with the community through services offered by the market, such as the Sprout Kids Club. Finally, the market is invested in improving nutrition in the Boise area as seen by their new SNAP EBT program.

This market has also overcome some challenges such as political pressure from some community stakeholders because it broken off from the Capital City Public Market and maximizing convenience for customers.

Boulder County Farmers' Market

The Boulder County Farmers' Market is based in the City of Boulder, CO, which has a metro population of 294,567 people.

Business Structure

The Boulder County Farmers' Market is a twenty-seven year old non-profit market governed by a Board of Directors. The market employs an executive director, market manager, a full time bookkeeper, and a market coordinator.

Financial Structure

Income from vendor fees covers cost of market operations. The market does not have other financial sources such as grants or subsidies.

Products and Services

The market offers a variety of proteins, produce, and other foods, primarily sourced from Boulder County and the surrounding region. The majority of the fruits served at the market are from the western slope, outside of Boulder County.

The market accepts WIC and SNAP as well as the University of Colorado's student card. Other services provided by the market include marketing and outreach, chef demos, music and entertainment, an ongoing art show, and ATM's placed around the market. In the future, the farmers' market hopes to host conferences and food events.

Market Characteristics

As a whole, the Boulder community is very supportive of the local food movement, and it is one of the reasons of the success of this market. Customers represent a wide demographic spectrum. On a typical market day, die-hard local food eaters visit early in the morning. By mid-morning there are more families at the market followed by students during the afternoon.

A specific focus is placed on outreach to low-income earners to break the stigma that local food is more expensive.

Successes and challenges

Boulder County Farmers' Market runs three markets and there are two other markets located in the area. In addition to this, there are a number of natural food stores and co-ops, farm stands, CSAs, and restaurants, which emphasize local agriculture. This growing number of markets and grocery stores in the area is one of the challenges this farmers' market faces. Others challenges include the weather and climate conditions, such as the flood in late 2013 that lowered the availability of fresh local food, and staff turnover.

Phoenix Public Market

Phoenix Public Market is based in Phoenix (AZ). The city has a metro population of 3.2 million people. It is a nine years old non-profit public market.

Business Structure

The Phoenix Public Market is a non-profit market. A Board of Directors governs the market. The market employs four people: two market managers and two assistant staff members. The employees handle market logistics including vendor registration, finances, advertisement, set-up, clean up, and quality control.

Financial Structure

The financial sources if this market is the 10 percent vendors have to give of their daily sales, which helps to cover the expenses for a special events permit from the City of Phoenix, electricity bills, garbage bills, property taxes, and equipment including tents, tables, and on-site storage containers. This market initially sought out grant a funding to cover operational expenses, but in recent years, moved away from seeking external funding sources.

Products and Services

Food sales, both produce and value-added, account for approximately 70 percent of the market's total sales, with the remaining 30 percent coming from a wide variety of local non-food products such as flowers, potted plants, soaps, ceramics, and other crafts.

Initially, the market would only host vendors selling exclusively Arizona-grown or produced products, but recently, they have expanded the requirements to allow "regional" produce as well. "Regional" includes produce from neighboring states that Arizona farmers trade for (e.g. avocados from California). Arizona's climate and growing season make it difficult for farmers to meet food demand year-round.

The market accepts all federal food benefits and works closely with the state to ensure that they can continue to offer these services as many customers take advantage of them.

Some services the market provides include space for new businesses, such as food carts, to test their products, market themselves, and create a customer base.

Occasionally, the market works with a local bank to offer microloans to vendors, although this service has not been widely utilized. The market's partnership with the Phoenix Public Market Café further supports the goal to grow small local businesses.

The market has considered taking a more active role in business development and product marketing, but the staff and board ultimately felt that those services were offered elsewhere (e.g. through the City or the Chamber of Commerce). For that reason, rather than duplicate services, the market will refer vendors to these existing resources.

Market Characteristics

The market's patrons represent a wide demographic spectrum. A diversity of ages and income levels shop at the market, which indicates that the produces offered cater to many needs and are affordable.

Successes and challenges

The consistency of location and operational hours, the central and accessible location, and maintaining good relationships with surrounding businesses are some of the factors that lead to the success of this market.

On the other side, trying to grow too aggressively by establishing a 7-day per week grocery store, which did not survive, maintaining a balance of products due to Arizona's climate, managing relationships between vendors, and vetting products for quality source are some of the challenges faced by the Phoenix Public Market.

Public Markets

CPW identified five public markets as case studies. Although two of these public markets names are farmers' markets, CPW considers these markets as public markets by this study's definition.

For the purpose of this study, a public market is a year-round permanent destination where local and regional food producers, artisans, and other businesses interact directly with consumers and trade their products. A public market also serves as a venue and gathering place for the community, and provides a variety of services.

Western North Carolina Farmers' Market

Western North Carolina Farmers Market is based in Asheville, NC, which has a metro population of 85,712 people.

Business Structure

The Western North Carolina Farmers' Market is a thirty seven year old publicly owned market, and is operated by the North Carolina Department of Agriculture & Consumer Services.

The market has five permanent open-air truck sheds that provide 194 spaces for farmers and dealers to display top quality produce at reasonable prices. One truck shed is designated for certified farmers who sell what they grow direct to the consumer. Other sheds are mixtures of independent farmers or resellers. Some farmers designate someone else to sell their product. The market does not lease the sheds.

Furthermore, the market has a permanent small dealers building and two large permanent wholesale buildings consisting of more than 38,000 square feet. These buildings offer produce year round to grocery stores, restaurants, institutions, and roadside markets. This area is open 24 hours, seven days a week.

Financial Structure

The operations are financed 75 percent through the market, and 25 percent through appropriated funds from tax dollars.

Products and Services

The market's retail area consists of small local shops, and displays high quality fruits and vegetables, mountain crafts, jams, jellies, preserves, sourwood honey, fresh baked breads, cookies and dozens of other farm fresh items. The market is "dead" from January to March, but the retail shops remain open. During wintertime, they sell plants, pumpkins, and Christmas trees.

Additional to selling food, the market provides services for different schools in the area. The local community college participates in a "Chef School" with the other schools.

The primary customers at the market are Asheville residents and tourists that visit the city.

Successes and challenges

Western North Carolina Farmers' Market faces challenges such as competition with grocery stores, and farmers' little knowledge about government regulations. On the other hand, promotion of local North Carolina products is a main success.

Burlington Farmers' Market

Burlington Farmers' Market is based in Burlington (VT), a city with a metro population of 213, 701 people.

Business Structure

The Burlington Farmers' Market is a thirty eight year old non-profit farmers' market started by AmeriCorps volunteers.

The market rents space in a park in downtown Burlington, which includes a permanent, large indoor auditorium. The summer market is half inside and half outside, while the winter market is in the auditorium. The market is located in the middle of downtown at a key intersection next to city hall where it is at capacity, but there is opposition to continued growth.

Financial Structure

Financially, this market relies on annual membership fees paid by the market vendors, and it does not have other sources such as grants.

Products and Services

The market offers three main types of products: agricultural produce, crafts, and prepared foods. The market's charter registered with the city regulates the proportion of vendors to 55 percent agricultural, not more than 30 percent crafts and not more than 30 percent prepared foods. The current percentages are 55 percent agricultural produce, 28 percent prepared foods and 12 percent crafts (there are many extra crafts and prepared food vendors wanting to join but they need to balance that with produce vendors).

Crafts and prepared foods get 70 percent of their sales from tourists and 30 percent from locals, for produce it is the opposite.

Market Characteristics

A market analysis of the clientele three years ago found that less than five percent came from more than 10 miles away (except tourists), and most customers walk to the market because there is limited parking. Moreover, the market gets a lot of tourist business from visitors to Burlington in the summer, but not as many in the winter.

Successes and challenges

The successes of this market are due to the buy local culture of Vermont that makes the marketing and consumer education easier, and the support from the City on every issue. On the other side, one of the challenges is the perception that the farmers' market is turning more into a street fair that wants to capitalize tourist dollars by selling more prepared foods instead of produce products.

Central New York Regional Market Authority

Central New York Regional Market Authority is based in Syracuse (NY), a city with a population of 145,170 people and a metro population of 662,577.

Business Structure

The market is a seventy-six percent publicly owned public market.

The market is a wholesale and retail market with large facilities. The market has three permanent commission houses that cover an area of 30,000 sq. ft. where wholesale businesses are located. There is a 100,000 sq. ft. freezer and refrigerator warehouse occupied by one tenant. There are several restaurants, shops, and common areas located in the administration building. The market also has a bank, Wendy's store, and storage facilities located on site.

Retail farmers lease market space, and can deliver a product anytime to any of the wholesalers.

Financial Structure

The market is a self-sustainable business. Ninety-five percent of the revenues come from renting space, buildings, and land, but the market receives some grants from the New York State Agriculture for promotions to implement projects, such as installing solar systems or other energy efficiency measures.

Products and Services

The retail area displays high quality fruits and vegetables, crafts, jams, jellies, preserves, honey, fresh baked breads, cookies, and dozens of other farms fresh items. It also has a deli that offers sandwiches and ice cream.

Furthermore, the market offers public health outreach and programs. For instance, the market does a lot of work with the Office of the Aging by serving as a meal site every other week.. The market also works with a number of agencies including food pantries and health departments. Additionally, the market operates a mobile market that sells local products about five or six nights a week to places, such as hospitals or senior centers. The mobile market also runs a demonstration kitchen for customers.

Market Characteristics

The wholesale farmers' market consists of 25 vendors during the growing season. The primary customers of the wholesalers are small grocery stores, small farm markets, people that go to other farmers' markets, restaurants that buy directly, and other institutions. The wholesale farmers' market is on Tuesdays, Thursdays, and Saturdays.

The retail market consists of 450 stalls that serve approximately 170 local farmers. The retail market is on Saturdays and Thursdays, and the flea market is on Sundays.

The majority of the customers of this market come from a 30-mile radius. The market is a very popular place for visiting and social activities. The market holds concerts and other social events on non-market days.

Successes and challenges

The refocus on local products, the explosion of the popularity of public markets, and people's interest in knowing where their food is from has led to the successes of this market.

On the other hand, the weather, a large influx of chain grocery stores in central New York, and the fact that some of the wholesalers left the market as it deteriorated in the 60s and 70s have been some of the challenges faced by this public market.

Oxbow Public Market

Oxbow Public Market is based in Napa (CA), a city of approximately 76,915 people.

Business Structure

The Oxbow Public Market is a seven-year-old for-profit public market managed by a managing partner and a group of investors. The managing partner functions are to control all of the operations and decisions of the market and report back to the investor group.

The market leases space to tenants who can sub-lease the space to other people.

Oxbow Public Market's physical structure is a mix of a permanent main building and a detached building. The main building is approximately 14,000 square feet and is all inside under-roof. In the inside, the market is a mixture of tenants, who all have open businesses booth. Additionally, the market has a common area in the market to allow customers to eat and sit to enjoy the market. The detached building is in very close proximity to the main building and shares a corridor with the main building. The detached building consists of a stand-alone restaurant revenue, which has 4,000 square feet per restaurant.

The Oxbow Public Market provides, by requirement of the Napa Valley Health Department, cold storage for the restaurants and a common area food storage that is used by different restaurants. Additionally, some of the restaurants were able to build their own walk-in cold storage, as they need it.

Financial Structure

The profits for this market come from the tenants' marketing fee, lease, and the camp charges, which are a common area maintenance charge that covers electricity, water, sewer, common area cleaning, and property taxes. The market does not receive any grant or money from public agencies.

Products and Services

Oxbow Public Market is a mix of approximately 23 retail and restaurant stores. It includes businesses such as bakery, beer, breakfast, charcuterie, cheese, coffee, dessert, dining, diner, gift, housewares, lunch, meat, olive oil, produce, seafood,

shopping, spices, spirits, and wine. The variety of products keeps the market as a place where locals get all their products for a meal.

The vendors of the Oxbow Public Market source locally; however, the market has never seen decreased in supply in the off-season because of the broad base of local farmers that stock purveyors in the area.

The market does not offer health outreach or gardening, but it has a routine of cooking demonstration. Additionally, the market does not receive Supplemental Nutritional Assistant Program.

Market Characteristics

The primary customers are the locals that not only go to get the food for their meals, but also to have breakfast, lunch, and dinner. The secondary customers are the tourists that visit Napa Valley. During the winter season, the local population heavily supports the sales at this market, and the market considers that its success is due to this support.

Successes and Challenges

The mixture of tenants and high quality artisan products and food made this market a tourist destination in the Napa area. Furthermore, the support of the local people during wintertime is also part of the success of this market.

The challenges faced by Oxbow Public Market consist are the differences in the operation hours between the restaurants and the retail businesses, the mixture of businesses being opened and closed at different hours, and trying to maintain a very steady and appealing experience for the customers during those times when some of the business may be closed.. Additionally, the market regrets not having space for social and private events.

Rochester Public Market

The Rochester Public Market is based in Rochester (NY), a city with approximately 210,532 people.

Business Structure

The Rochester Public Market is a publicly owned market managed by the City of Rochester.

This market leases space to vendors, but vendors are independents from the City of Rochester or the management office. Farmers have priority when there is a space available for leasing.

The facility consists of two open-air sheds and one enclosed shed. Vendors utilize the two open sheds are utilized year round and the larger shed has kerosene heaters for the winter season. The indoor shed has 63 spots; however, it was built in the 70s and lacks an efficient plumbing and drain system; for that reason, it is no longer useful for vendors that sell products such as meat and fish.

Financial Structure

The Rochester Public Market has been very successful over the last 20 years. The reasons for this success is the sale of food, the activities developed at the market, and also the national trend about eating local and the human interaction experience with the farmers and visitors at the market.

The market is self-supporting. The market's operating budget is around \$650,000 dollars annually. Additionally, the market has multiple financial sources, such as grants through the city of Rochester and the state of New York, taxes, and city bonds that help implement redevelopment projects.

Rochester Public Market boosts the economic development of the city. It has encouraged the redevelopment in the surrounding buildings and vitality in the public spaces.

Products and Services

The Rochester Public Market provides a variety of products and services. The market has 300 vending stalls. The main products shoppers seek at the market are first fresh produce, then meat, fresh cheese, baked goods, and, general merchandize, and art and crafts. Vendors are local, estimated within 100 miles.

Amenities for the community include the flower city market, food truck rodeos, summer concert, garage sale, market token program, nutrition outreach program, healthy tasting and a nutritional information event, food demonstrations, school tours, and the Women Health screening fair. Many of the activities are developed in partnership with other organizations.

Market Characteristics

The Rochester Public Market is primarily a retail market. However, it has three wholesale produce businesses based in front of the market. The main customers that visit the market are residents from the city, the six surrounding counties, and tourists.

Successes and Challenges

Parking and congestion, relationship with vendors, differences in the operation hours between the vendors, and the participation process for the redevelopment sites are some of the most important challenges this market has undergone.

Food hubs

CPW identified five food hubs as case studies. Food hubs are a new concept introduced by the United States Department of Agriculture within the past five year. Because of this, many definitions and types of food hubs exist.

For the purpose of this study, a food hub is a business that supports local and regional small and mid-sized farmers, food producers, and small entrepreneurs, through aggregating, distributing, and marketing their products to not only help

them satisfy wholesale, retail, and institutional demand, but also to provide the community with access to local food. Food hubs also aim to strengthen the local economy.

GrowFood Carolina Food Hub

GrowFood Carolina is a food hub located in Charleston, SC, a city with a population of 120,083 people.

Business Structure

GrowFood Carolina Food Hub is a three-year-old non-profit business.

GrowFood Carolina is an offshoot of the South Carolina Coastal Conservation League (CCL), but it functions as an entirely separate organization with its own Board of Directors.

Financial Structure

This business began with approximately \$600,000 dollars of initial capital investment. \$500,000 of this came in the form of a donated 5500 sq. ft. warehouse building, with another \$100,000 in the form of private monetary donations. The food hub has one refrigerated truck and one van for distribution, which serve approximately a 20-mile radius. The food hub also “back hauls” by dropping products off with other distributors to be dispersed throughout the Southeast.

The food hub covers operational costs through a combination of fundraising (grants and private/corporate donations), income from the rental of office space in the warehouse, and a 20 percent operational fee retained from all grower sales (growers are paid 80 percent of expected sales upfront).

Approximately 60 percent of sales come from restaurant purchases, 35 percent from retail stores, and 5 percent from small institutions and caterers.

Products and Services

GrowFood provides four main services: (1) outreach to over 50 farmers to provide assistance with growing practices and post-harvest handling of products, (2) warehouse space for growers to aggregate their products, (3) distribution services to buyers, and (4) marketing services, such as branding and marketing growers’ products to promote the consumption of local food.

The food hub also partners with many other organizations with related missions to offer a wide range of local food related services, including nutrition and environmental education.

Market Characteristics

The Charleston area does not currently have any other operations providing services similar to GrowFood’s offerings. Since GrowFood began distributing food in 2011, interest surrounding local food has grown, and the “Local GrowFood Carolina” label has become a familiar site in grocery stores.

Although GrowFood did not conduct a market analysis or feasibility study before beginning their operation, those involved with the food hub's development had a solid understanding of what challenges prevented the local food movement from growing.

Successes and Challenges

One of the reasons of the success of this food hub is the fact that farmers were ready to sell local products and consumers were willing to purchase them. Nevertheless, educating growers about post-harvest handling best practices has posed a huge challenge.

Intervale Food Hub

Intervale Food hub is located in Burlington, VT, a city of approximately 213,701 people.

Business Structure

Intervale Food Hub is a six-year-old non-profit food hub, and an enterprise of the Intervale Center. Intervale Food Hub was created as a response to the increased demand for local food in the region, and it started out as a multi-farm CSA, which then evolved into a direct to consumer food hub.

Financial Structure

This food hub relies mostly on revenue for its finances, and less on grants. However, Intervale Food Hub receives grants from the USDA and a combination of public and private grants.

Products and Services

Intervale Food Hub offers a variety of fruits and vegetables that are grown in the area. Furthermore, it provides a variety of services:

1. Assistance to farmers with detailed production profiling so that they know what to expect to grow;
2. Distribution services to businesses, work places, schools, and civic centers;
3. Educational outreach in partnership with schools and employers to build relationships with them, and communicate the value of eating locally;
4. Marketing services, such as producer profiling, social media, and an e-newsletter;
5. Negotiates its price list annually; and
6. Provides annual network meetings for farmers.

The distribution services include delivering to small colleges nearby and the University of Vermont. Additionally, students are able to order online and the food hub delivers to approximately 150 students that live off campus.

In terms of seasonality, the food hub works to educate people about what is seasonally available and how to eat and prepare available produce. It also works with producers to supply during the winter months and increase availability.

Market Characteristics

The primary market is the Greater Burlington area is everything within a 75-mile radius. Primary customers are those that work, live, and learn in Burlington.

This hub shares the market with two processing hubs in the greater Burlington area as well as wholesale distributors.

Successes and Challenges

The food hub's location, scale, model chosen for the community, the Intervale Center's support, and the farmers are the reason of the success of this hub. On the other hand, to grow the demand, the energy spent to coordinate the supply, and financing are the main challenges for this food hub.

La Montanita Co-op and Distribution Center

La Montanita Co-op and Distribution Center is located in Albuquerque (NM), a city with a population of 555,417 people and a metro population of 902,797.

Business Structure

La Montanita Co-op and Distribution is a thirty-eight year old cooperative food hub. The cooperative legal status means that it is owned by its consumers; approximately 14,000 members in its six stores based in Albuquerque, Gallup and Santa Fe¹.

The food hub first began as La Montanita Cooperative, a retail store, and later in the 2004, it opened its subsidiary La Montanita Distribution Center, a wholesale distributor.

The La Montanita Co-op and Distribution Center operates a 17,000 square-foot warehouse with refrigerated and frozen storage², which is used for 400 out of 900 producers and suppliers selling to the cooperative³.

1 La Montanita Co-op Food Market. (2014). We love food! Retrieved from: <http://lamontanita.coop/mission/>

2 Cantrell P., Heuer, B. (March 2014). Food hubs: solving local. The Wallance Center at Winrock International. Retrieved from: <http://ngfn.org/solvinglocal>

3 U.S. Department of the treasury. Financing healthy food options: implementation handbook case study, la montanita cooperative. Retrieved from: www.cdfifund.gov/what_we_do/.../CS%20-%20La%20Montanita.pdf

Financial Structure

La Montanita has multiple sources of funding, such as income generated from operations, several loans from NCB Capital Impact, loans from a local community bank, capital raised through community investment initiatives, and loans to Co-op members serviced by State Credit Union⁴. The distribution center was funded through a combination of operations income and loan capital⁵.

La Montanita estimates it captures approximately 20 percent of total purchases and sales of local food in the state. The food hub generated \$4.6 million in sales during 2013⁶.

Products and Services

La Montanita Co-op offers fresh organic produce, bulk foods, local organic beef, lamb, and other meats and cheeses, fair trade products and a wide variety of natural and organic groceries, freshly prepared deli foods, natural body care, vitamins, and supplements.

This food hub sources locally from within a roughly 300-mile radius of Albuquerque⁷

It provides:

- Support to local farmers through the Food-Shed Project, an initiative that helps local farmers and producers get their products into more markets, such as small community grocers, restaurants, and commercial kitchens as a result of the Co-op Distribution Center⁸;
- Dry, refrigerated, and frozen product pick-up;
- Distribution system;
- Wholesale capacity building through purchasing food from farmers and producers for resale;
- Sales brokering⁹;
- Micro-loans to local producers;
- Business development support through its in-house enterprise development Staff¹⁰;
- Discounts (18 percent) on all purchases once a week, at the member's convenience, in exchange for one hour of donated time weekly¹¹; and

4 Ibid.

5 Cantrell P., Heuer, B. (March 2014). et. al.

6 Ibid.

7 La Montanita Co-op Food Market. (2014). et. al.

8 Ibid.

9 Cantrell P., Heuer, B. (March 2014). et. al.

10 La Montanita Co-op Food Market. (2014). et. al.

11 Ibid.

- Financial support through a pre-pay program in which the co-op advances funds to vendors and deducts it from future invoices.

Market Characteristics

La Montanita Co-op and Distribution Center serves approximately 14,000 members throughout New Mexico. Furthermore, wholesale buyers include Whole Foods, Bon Appetite, small businesses, and other retail co-ops¹².

Successes and challenges

The factors that have contributed to La Montanita success is the focus on selling local products and its exclusive contract for many years with the Organic Valley Company; a milk and milk-related products producer that helps this business in the path to become a wholesaler¹³.

Hollygrove Market and Farm

Hollygrove Market and Farm is food hub based in New Orleans, LA, a city with a population 378,715 people and a metro of 1,240, 977.

Business Structure

The Hollygrove Market and Farm is a six year old non-profit. It is an urban farm, local produce market, and community garden space that operates as Community Supportive Agriculture style cooperative, and retail market¹⁴.

Financial Structure

The literature did not provide financial information.

Products and Services

This farm sells a “box.”; a mix of naturally (organic methods, but not certified), conventionally, and (occasionally) certified organic fruits & vegetables. The market and farm source food from backyard growers, community gardens, urban micro-farms in New Orleans, and rural farms throughout southern Louisiana and Mississippi.

Hollygrove uses Good Eggs food hub platform to deliver food to its consumers.

This business supports the development of community gardens, provides training programs, serves as a demonstration site for visitors interested in adopting environmentally sustainable practices, and implements environmental programs such as sustainable gardening and recycling¹⁵.

¹² Cantrell P., Heuer, B. (March 2014). et. al.

¹³ Ibid.

¹⁴ Hollygrove Market and Farm. (2014). Who we are. Retrieved from: <http://hollygrovemarket.com/who-we-are>

¹⁵ Ibid.

Market Characteristics

This market serves both households and restaurants¹⁶.

Successes and Challenges

The literature did not provide information about successes and challenges.

Local Food Hub

The Local Food Hub Farm is located in Charlottesville, VA, a city with a population of 43,475 people and a metro of 206,615.

Business Structure

The Local Food Hub is a five-year-old non-profit food hub governed by a six-member Board of Directors¹⁷.

Its infrastructure includes a 3,500 square foot warehouse with multiple temperature zones, a loading dock, limited office space, a large cold storage room, a bathroom, a small kitchen area¹⁸, an 18-foot refrigerated delivery truck, and a smaller refrigerated van.

Financial Structure

The operational budget of this food hub for the year 2011 was \$580,000, of which \$75,000 reflects earned income while the remainder is raised through a variety of sources, including local and federal government grants and foundations.

The Local Food Hub takes a percentage of the food sales and has received numerous grants, including one to buy local meat for the Virginia Farm to School Program¹⁹.

Products and Services

This food hub sells locally grown fruit, vegetables, meat, eggs, and value-added items from more than 70 small family farms in Central Virginia. The definition of local for this food hub is within 60-100 miles of Charlottesville, Virginia²⁰.

The Local Food Hub provides the following functions and services:

- Provide technical assistance for farmers on topics such as food safety, season extension, soil management, organic agriculture, and processing;

16 Beyond the plate. (2010). New Orleans: Hollygrove market and farm. Retrieved from: <http://www.beyondtheplate.net/travel/hollygrove-market-and-farm/>

17 Future Harvest. (2011). Visit to the Charlottesville Local Food Hub. Retrieved from: http://www.futureharvestcasa.org/index.php?option=com_content&view=article&id=133

19 Local Food Hub. (2014). How it works. Retrieved from: <http://localfoodhub.org/howitworks/>

20 Ibid.

- Aggregate food;
- Provide cold storage and marketing services to farmers²¹;
- Distribute to more than 150 locations;
- Distribute of local food into low-income neighborhoods and food banks and hunger organizations;
- Participate in the program “Virginia Farm to School Week.” is an opportunity for all schools to purchase, serve, and promote Virginia Grown foods in their cafeterias during the week²²
- Build connections between schools, students and agricultural producers throughout Virginia;
- Run the “Local Food Hub’s Farm to School Fund” which funds through community donations and foundations the “bridge gap” that prevent schools to access local food²³; and
- Run a 75-acre educational organic farm called Maple Hill, which was donated by musician Dave Matthews, in Scottsville, Virginia. Part of the produce of this farm goes for the food bank²⁴.

Market Characteristics

The Local Food Hub has retail and wholesale customers. Wholesalers include public schools, hospitals, institutions, and restaurants²⁵. Furthermore, the hub worked with a consultant to gauge what products customers want to buy to get farmers to grow what consumers want.

The Local Food Hub delivers within a 40-mile radius of the hub²⁶.

Successes and challenges

One of the most important components of the Local Food Hub’s success lies in its relationships with farmers and buyers, affordability of products, and the direct connection to local agriculture.

Some of the challenges pertain to the financial sustainability of the hub. To mitigate the financial challenges the Local Food Hub has a part time grant writer. Additionally, transportation for farmers was a challenge because the farmers did not use to have the produce ready to pick it up, which delayed the distribution. Due to the lack of transportation, the food hub developed a transportation system regarding time and location with farmers²⁷.

²¹ Ibid.

²² Future Harvest. (2011). Et al.

²³ Local Food Hub. (2014). Farm to school. Retrieved from: <http://localfoodhub.org/howitworks/>

²⁴ Future Harvest. (2011). Et al.

²⁵ Local Food Hub. (2014). Where to find our food. Retrieved from: <http://localfoodhub.org/howitworks/>

²⁶ Future Harvest. (2011). Et al.

²⁷ Ibid.

Case Study Main findings

Business Structure

- The mission of the businesses is to support agriculture through providing a place not only to sell products, but also to serve as a gathering and meeting place.
- A Board of Director is the common management model for these businesses. The exception is Oxbow Public Market, which is a for-profit market managed by a managing partner and a group of investors.
- Most of the markets and food hubs are located in the downtown of their cities where they can be accessible to the community.
- Public markets have permanent buildings with open and enclosed sheds, while farmers' markets do not.

Financial Structure

- The lease and other fees paid by vendors, such as the percentage of the sales, are the main financial sources of these three business models.
- Publicly owned markets have multiple financial sources such as taxes, city or state grants, and city bonds.

Products and Services

- Farmers' markets and public markets provide more variety of products than food hubs. Farmers' and public markets sell produce, other food products such as meat, cheese, and fish, art and craft, and plants, while food hubs sell mainly produce and other food products.
- Other services for the community complement the sale of food. Health and educational services are implemented by farmers' and public markets, while food hubs provide environmental and educational services. Cooking demonstrations is a common activity across markets and hubs.
- Partnerships with other organizations help markets and hubs provide many of their services.
- Markets and food hubs make a big effort to source locally. Each market and food hub has its own concept of "sourcing locally". Additionally, seasonality not only makes markets and food hubs to be flexible about sourcing locally, but also to implement different strategies to adapt to seasonality.

Market Characteristics

- Markets promote social cohesion; residents without distinction of income, race, or other characteristic shop at these markets.
- Local residents' support is relevant for the success of these businesses, mainly during the winter season when the number of tourist shoppers and variety of products decrease.
- Different from markets, food hubs have to develop strong marketing and distributing services to look attract consumers.
- Retail is a main feature of farmers' and public markets, but food hubs such as La Montanita, also have a retail component.
- Publicly owned markets not only have retail, but also wholesale and restaurants. However, wholesale at this market is not operated by the market, but for the renters of the space.

Successes and Challenges

- Successes and challenges depend on the context of each market and food hub. However, support of local residents and focus on local products are the most common factors of success.
- Focus on local product seems like a contradictory idea due to the flexibility on sourcing locally. Although, this is what CPW heard during the interviews.
- Building partnerships to provide services is relevant in the success of the food hubs.
- Seasonality and sharing the market with a growing number of grocery stores are the most common challenges between the markets. While, getting financial sources is the most common between the hubs.

Case Study Summary Tables

Business Structure Table

BUSINESS STRUCTURE	Boulder County Farmers' Market	Boise Farmers' Market	Phoenix Public Market	Western North Carolina Farmers Market	Burlington Farmers' Market	Central New York Regional Market	Oxbow Public Market	Rochester Public Market	GrowFood Carolina Food Hub	Intervale Food Hub	La Montanita Coop and Distribution Center	Local Food Hub	Hollygrove Market & Farm
	FARMERS MARKET			PUBLIC MARKETS					FOOD HUBS				
Legal status													
Public				X		X		X					
Non-profit	X	X	X		X				X	X		X	X
For-profit							X						
Cooperative											X		
Years in operation													
	27	2	9	37	38	76	7	109	3	6	38	5	6
Management Model													
Board of directors	X	X	X	X	X	X		X	X	X	X	X	X
Location													
Downtown	X	X	X	X	X	X			X	No data	X		X
Area different to downtown							X	X				X	
Facility characteristics													
Indoor				X	X	X	X	X	X		X	X	X
Outdoor	X	X	X	X	X			X				X	
Owned facility				X		X	X	X	X		X		
Rented facility					X							X	X
Permanent facility				X	X	X	X	X	X	X	X	X	X
Non-permanent facility	X	X	X		X							X	
Opened Year Round													
Yes	No data		X	X		X	X	X	X	X	X	X	X
No		X			X								
Days per week	2	1	3	7	6-8 times per season (october to April)	7	7	3	No data	No data	7	No data	7

Financial Structure Table

FINANCIAL STRUCTURE	Boulder County Farmers' Market	Boise Farmers' Market	Phoenix Public Market	Western North Carolina Farmers Market	Burlington Farmers' Market	Central New York Regional Market	Oxbow Public Market	Rochester Public Market	GrowFood Carolina Food Hub	Intervale Food Hub	La Montanita Coop and Distribution Center	Local Food Hub	Hollygrove Market & Farm
	FARMERS MARKET			PUBLIC MARKETS					FOOD HUBS				
Source of funding													
Fee for lease space	X	X	X	X	X	X	X	X					X
Cut off sales, grants, donations, and taxes	X	X	X	X		X		X	X	X	X	X	X
private sources (sponsors, investors, loans)								X			X		X

Products and Services Table

PRODUCTS AND SERVICES	Boulder County Farmers' Market	Boise Farmers' Market	Phoenix Public Market	Western North Carolina Farmers Market	Burlington Farmers' Market	Central New York Regional Market	Oxbow Public Market	Rochester Public Market	GrowFood Carolina Food Hub	Intervale Food Hub	La Montanita Coop and Distribution Center	Local Food Hub	Hollygrove Market & Farm
	FARMERS MARKETS			PUBLIC MARKETS					FOOD HUBS				
Products													
Produce	X	X	X	X	X	X	X	X	X	X	X	X	X
Other food products (meat, cheese, dairy)	X	X	X	X	X	X	X	X	X	X	X	X	X
Prepared food	X	X	X	X		X	X	X			X		
Art & craft	X		X	X	X			X			X		
Services for the Community													
Health programs		X	no data		X	X		X					
Educational programs	X	X		X	X	X	X	X		X	X	X	X
Entertainment activities	X				X	X		X					X
Environmental programs		X						X	X		X	X	
Services provided for vendors													
Aggregation		no data			no data			no data	X	X	X	X	
Distribution									X	X	X	X	X
Marketing	X		X				X		X	X	X	X	X
Storage				X					X	X		X	
Cold storage				X		X			X			X	
Technical Assistance									X	X	X	X	
Sourcing locally													
local/regional year-round	X	no data	X	no data		no data	X	X	no data	no data		X	X
local /regional part of the year					X								
No local/regional sourcing requirement											X		

Market Characteristics Table

MARKET CHARACTERISTICS	Boulder County Farmers' Market	Boise Farmers' Market	Phoenix Public Market	Western North Carolina Farmers Market	Burlington Farmers' Market	Central New York Regional Market	Oxbow Public Market	Rochester Public Market	GrowFood Carolina Food Hub	Intervale Food Hub	La Montanita Coop and Distribution Center	Local Food Hub	Hollygrove Market & Farm
	FARMERS MARKET			PUBLIC MARKETS					FOOD HUBS				
	Market Model												
Retail	X	X	X	X	X	X	X	X		X	X	X	X
Wholesale				X		X		X	X	X	X	X	
Restaurants				X		X	X						
	Consumers												
wholesalers				X		X			X	X	X	X	
Residents	X	X	X	X	X	X	X	X		X	X	X	X
Tourists	X	X		X	X	X	X	X			X		
	Competitors												
Other farmers markets in the area	X		X	X	X		X	X	no data			no data	no data
Other public markets in the area		X											
Other food hubs in the area										X			
Grocery stores	X		X	X		X		X			X		